

## Understanding and Managing the Emotional Labor of Qualitative Research

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emotional labor;  
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**Abstract:** To offer solutions for qualitative researchers who are working to overcome emotional labor, we have drawn on data from fieldwork focused on marginalized populations including mothers of children with disabilities, North Korean defectors, and educators working in under-resourced, remote rural school districts. It is important to recognize the significance of emotional labor in qualitative studies as its effects can have personal consequences for the researchers, can influence the experiences of vulnerable participant populations, and can shape data analysis. Through a tripartite form of autoethnography, we explored our own experiences of emotional labor. Based on field notes and discussions both during and after fieldwork, we investigated ways to overcome the burdens of emotional labor through personal, relational, and instructional approaches. By elaborating potential areas where scholars can protect themselves from difficulties and grow personally and collaboratively, our findings can help researchers, educators, and students better prepare themselves for investigating the challenges facing marginalized populations while promoting social justice and advocacy.

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## 1. Introduction

It is important to recognize the significance of emotional labor in qualitative research and unpack the complex personal consequences of conducting research with vulnerable populations. Researchers need to be prepared to manage the emotional labor of qualitative research. This preparation could be part of graduate study and professional development post-graduation, all of which would utilize relevant readings and workshops (DICKSON-SWIFT, JAMES, KIPPEN & LIAMPUTTONG, 2008; JOHNSON & CLARKE, 2003). Experienced qualitative researchers, as well as postdoctoral and graduate students, have concerns about how best to manage the challenges of fieldwork (VAN DEN SCOTT, 2018). Researchers with diverse field experiences need strategies for setting boundaries in the field and lessening the emotional burden of meaningful and ethical research (MORRIS & DAVIES, 2018; PAWELZ, 2018; WATERS, WESTABY, FOWLER & PHILLIPS, 2020). Focused on building safe boundaries and generating peer support, researchers presented techniques for creating professional and relational boundaries within the research process. For example, LISIAK and KRZYŻOWSKI (2018) demonstrated ways to create virtual peer support (e.g., messengers and email) to unpack and manage emotional burdens during field work. In terms of boundaries in friendship, VAN DEN SCOTT (2018) recognized the challenges of interviewing close friends and the importance of building relationships such as "close-but-not-too-close friends" (p.28) to keep professional distance while forging reciprocity. We share our understanding of the significance of self-care and the effects of emotional labor during or after fieldwork. We understand self-care as it has appeared in the work of Black feminists such as LORDE, HOOKS and ANZALDUA where it is political (KIM & SCHALK, 2021; LORDE, 1988; NAYAK, 2020; NICOL & YEE, 2017) and connects to the social justice aims of our research with marginalized communities. We acknowledge the complexity of fieldwork and research dynamics and offer ways to navigate the research process with sensitivity by seeing the implications of the researcher/participant relationship, by reviewing one's own research strengths and weaknesses, and by finding opportunities for improvement that will relieve emotional labor. Considering these contributions, this article adds to the already rich literature about emotional labor in qualitative research, specifically in the use of trioethnography to assist researchers in developing skills and practice for managing emotional labor. It is grounded in concrete projects drawing implications and conclusions from empirical data and anecdotal experiences. [1]

Qualitative researchers can be exposed to research environments that exceed their anticipated emotional and relational involvement, especially when working with vulnerable populations (e.g., SCHMALENBACH & KIEGELMANN, 2018; SIMON, 2012). MANNAY (2018) conducted research with marginalized mothers and their daughters over four-years and suffered from overwhelming helplessness and depression even after the field work. In this article, we draw from our own documented experiences with vulnerable populations and existing research literature to discuss the trials of this kind of research, introducing productive approaches to address these challenges. We describe personal and

collaborative experiences for conceptualizing emotional labor and present strategies for establishing positive field work experiences in difficult circumstances while building peer support among researchers. We provide a framework for conducting healthy field research by recognizing important boundaries between the researcher and participants (VAN DEN SCOTT, 2018) and by seeking outside support (LISIAK & KRZYŻOWSKI, 2018; MORRIS & DAVIES, 2018). First, we conceptualize emotional labor through the literature about qualitative interviewing (Section 2). Next, we review the ways emotional labor can be generated in qualitative field work (Section 2-3). Third, we explore our own experiences where emotional labor was a factor in the research practice (Section 3). Lastly, we suggest approaches to addressing emotional labor in qualitative research (Section 4-5). [2]

## 2. Emotional Labor

We consider qualitative research as a social practice of mutual narrative construction (GUBRIUM & HOLSTEIN, 2003; LINCOLN & GUBA, 2009) that requires a level of performance by researchers (LISIAK, 2015). In qualitative research, emotional labor refers to the researcher's emotional struggles (e.g., burnout, depression, and anxiety) resulting from taking an emic perspective of the research subject and encountering the reality of participant experiences with strong emotion. For instance, emotional labor could occur when a researcher listens to participants' traumatic stories while still needing to express culturally appropriate reactions to participants. Similarly, it can also occur when a researcher takes an emic perspective while attempting to write dispassionately. The researcher must distance personal feelings, particularly when interviewing vulnerable participants about sensitive issues. [3]

Emotional labor requires the "management of feelings to create a publicly observable facial and bodily display" (HOCHSCHILD, 1983, p.7) that reveals appropriate researcher reactions. During interpersonal transactions with participants, controlling emotional effects demands significant effort and planning for the researcher to limit or produce only verbal, facial, and physical reactions that are professionally appropriate (MALCOLM, 2012; MORRIS & FELDMAN, 1996). Researchers "who are committed to people and their world as the focus of their concern, and who are socially responsible" (ROGERS, 1994 [1985], p.289, as cited in GUY, NEWMAN & MASTRACCI, 2014, p.11). [4]

### **3. Emotionally Laden Research Studies**

We view vulnerable populations as those in need of special attention because they are susceptible to physical and emotional dangers as members of oppressed groups. As researchers, we must protect these individuals from being further marginalized by our research. We also suggest that researchers need to prepare for difficult research professionally and personally, especially when they may become susceptible to emotional strain as they immerse themselves in vulnerable communities. The findings of our current research will contribute to existing discourse on researcher-participant relationships (SIMON, 2012) focused on ways to protect researchers from fieldwork with vulnerable populations. Although researchers provided theoretical, ethical, and practical ways for empowering vulnerable research participants (ROSS, 2017; RYAN, 2015), few scholars suggested ways to protect and support researchers from their challenging and difficult research (MANNAY, 2018; PAWELZ, 2018). We managed three separate qualitative research studies where we experienced the burdens of emotional labor. Our aim was to share the stories of our participants from marginalized groups, acknowledging these individuals as a source of knowledge. We interpreted the ways in which they constructed and relayed multiple meanings of their circumstances. This approach required reflexivity as we developed meaningful relationships with the participants and recognized our own roles. As a political act, our goal was to make a positive difference in the lives of the participants. The experiences of emotional labor in this article are drawn from these three separate studies, each one carried out by one of the authors. [5]

#### **3.1 A study on mothering children with disabilities and the effects of stigmatization on parental identity**

Carol, a doctoral student at the time of the study, is an individual with a disability who has a child with a disability, and she spent over 30 years teaching adolescents with disabilities. She conducted a phenomenological study (MOUSTAKAS, 1994; VAN MANEN, 1997) of mothers of children with disabilities, identifying these mothers through educational connections and snowball sampling (GHALJAIE, NADERIFAR & GOLI, 2017; LEE & SPRATLING, 2019; PARKER, SCOTT & GEDDES, 2019). Carol collected data from four mothers whose children with disabilities met age and disability type criteria. Participants had children between the ages of 14-24 who were attending secondary or post-secondary school and had physical or learning disabilities. Carol did multiple, semi-structured interviews (ENGLANDER, 2012; SEIDMAN, 2006) of 60-90 minutes. Thematic analysis (BRAUN & CLARKE, 2006; NOWELL, NORRIS, WHITE & MOULES, 2017; VAISMORADI & SNELGROVE, 2019) was used to identify pertinent codes and themes. Phenomenology was an appropriate methodology as the goal of the study was to discover the lived experience (MOUSTAKAS, 1994; VAN MANEN, 1997) of these women as they constructed parental identities within discriminatory social environments. The study revealed that the stigma experienced by mothers of children with disabilities, the challenging school and community interactions they faced, and the structure of

power and privilege affecting marginalized children with disabilities and their families had a significant impact on the development of parental identity. The connection to disability through their children, despite not having their own impairment, led to disability being a significant identifying characteristic in the way others viewed these mothers and the way they saw themselves as mothers (PARK & ROGERS-SHAW, 2018). [6]

### **3.2 A study on learning through work and North Korean defectors' emotional labor in South Korea**

Jinhee, a doctoral student at the time of the study, worked with North Korean defectors in the workplace, exploring social enterprise for minority refugee populations in South Korea. Through nine months of manual labor and service work alongside North Korean defectors at cafes and restaurants, her ethnographic fieldwork focused on North Korean defectors' emotional labor (HOCHSCHILD, 1983) in formal and informal service settings. Both informal conversations and semi-structured interviews (PATTON, 2015; SCHRAM, 2006) were used to collect data from twenty-five participants. Twenty-five participants who shared similar experiences (e.g., over three months of working at the same service workplace and migrating to South Korea through China) were selected based on snowball sampling (BIERNACKI & WALDORF, 1981). Narrative analysis (RIESSMAN, 1993) was used to explore participants' challenges and struggles and exposed personal and interactive coping strategies grounded in participants' understanding of their reality (SPRADLEY, 1979). The findings informed that defectors managed the emotional requirements of the service workplaces through embracing, avoiding, and resisting social bias and ignorance toward North Koreans. As a group, defectors used interactive coping strategies such as sharing stories and criticizing collectively as ways to release intense feelings and corrected each other's attitudes. This study unveiled the dominant deficit discourse on North Korean defectors by illuminating the complications they encountered and the ways which they catalyzed learning to survive. [7]

### **3.3 A study on teachers' experiences and challenges in under-resourced rural schools**

Davin, a university professor and researcher for more than 20 years, investigated teacher experiences in under-resourced, underperforming, and remote rural schools. In this large-scale, qualitative study, he used phenomenological (MOUSTAKAS, 1994; VAN MANEN, 1997) and ethnographic (CRESWELL & POTH, 2016; FETTERMAN, 2010) tools within a deeply contextualized sondeo-style focus group (BUTLER, 1995) framework to generate participant driven data. 42 focus groups were conducted across six different public-school districts, revealing deeply complex circumstances for teachers, communities, and students. He used thematic analysis with robust member checking and rigorously triangulated findings which produced a rich and troubling portrait of post-great-recession conditions in these schools. Focusing on teachers' experiences in these contexts shows professionals working in the margins of mainstream education, experiencing extreme hardships in both their own formation as

educators and as caretakers of students in challenging circumstances. In its findings, the research team described how even experienced educators, deeply committed to their contexts and places, experienced personal trauma in their workplace because of encountering extreme student needs that could not be productively addressed given the circumstances. In the context of a state that had largely recovered from the great recession, possessed strong balanced budgets and, yet, retained policies of financial exigence that exacerbated the drastic funding differences between schools with deep local resources and those without, these educators were suffering just as much as their students (BUDGE, WARGO, CARR CHELLMAN & CANFIELD DAVIS, 2019; WARGO, CARR CHELLMAN, BUDGE & CANFIELD DAVIS, 2021a, 2021b). [8]

#### **4. Establishing a Relationship Between Researchers and Participants**

For several decades, the importance of researcher-participant relationships has been emphasized by postmodern, postcolonial, and constructivist scholars (GUBRIUM & HOLSTEIN, 2003; LINCOLN & GUBA, 2009; SCHMALENBACH & KIEGELMANN, 2018; SILVERMAN, 2011). Interviewing is a social practice; therefore, how participants build relationships with a researcher becomes important interactional data to situate local practice. Focusing on the relational aspect of qualitative research, the proper description of mutual engagement is emphasized. It is not only about the what of data collected (i.e., contents), but it is also about the how of data collection (i.e., process). Both need to be incorporated to contextualize locally negotiated knowledge construction (RAPLEY, 2001; TALMY, 2010). [9]

Researchers' informed knowledge and practice mediated by reflexivity can strengthen data collection and analysis (PUDDEPHATT, SHAFFIR & KLEINKNECHT, 2009). How researchers become aware of their relationship with the field and the communities within the field (reflexivity) and how they situate themselves in the socio-political environment within the organization of the participants' group (positionality) can affect both quality and quantity of data collection and writing. In her autoethnographic narrative, VAN DEN SCOTT (2018) described how a social role transition from an old friend to researcher in an Inuit community over five years shifted her relationship and evoked her sense of fear and excitement as well as confusion and loneliness. Delineating diverse emotions which she encountered, she presented her efforts to balance her feelings to maintain data integrity using reflexivity. [10]

Informed by reflexivity, researchers can manage their impressions. How researchers perform their role by enacting their commonalities and sociocultural expectations (i.e., impression management) plays an important role in accomplishing the research purpose *in situ* (BROOM, HAND & TOVEY, 2009). When researchers are aware of how their biography, their social status, their gender, and their age can affect the participants, they can regulate their reactions and avoid increasing anxiety among participants (LISIAK, 2015; OAKLEY, 1998; PAWELZ, 2018). They can manage their insider-outsider positionality (CREAN, 2018; MOROȘANU, 2015) and regulate their reactions. [11]

To create trust between the researcher and the participants, researchers must put a great deal of time, effort, and care into the relationship (ROSS, 2017); they must view participants as collaborators, and collaboration can lead to increased emotional labor as researchers become invested in the community. Through immersion in the participants' community, the researcher's interpretations of data will reflect both the community members' understanding of the culture and the researcher's own views, the emic and the etic positions (GERSTL-PEPIN & PATRIZIO, 2009). Reflexivity is significant to this process of relationship building, and it is also a tool for managing emotional labor. Researchers need to understand their positionality, truly hear what participants say, and maintain rapport. They must question their own ideas and acknowledge their differences with the participants while continually checking the data interpretation for bias (HESSE-BIBER & PIATELLI, 2012; MOROȘANU, 2015). The research process is not value free; "paying attention to the specific experiences and situated perspectives of human beings, both researchers and respondents alike, may actually become a tool for knowledge building and rich understanding" (BROOKS & HESSE-BIBER, 2007, p.13). [12]

The increased intellectual and ethical requirements on qualitative researchers to be reflexive and to bring caring into practice is poorly understood. Although Institutional Review Boards (IRB) may raise ethical concerns and introduce participant protections into the process, it is uncommon for researchers to articulate the cost of their emotional labor during and after fieldwork. Researchers' emotional labor is a product of the practice of qualitative research. The relationship between the researcher and the participant is one source of the researcher's emotional labor. [13]

#### **4.1 The consequences of emotional labor in qualitative research**

The costs of emotional labor can be burnout, shame, guilt, and emotive dissonance (HOCHSCHILD, 1983). Researchers who investigate trauma can encounter emotionally disturbing situations during data collection, transcription, data analysis, and writing because of the nature of their interaction and the stories they uncover (KIYIMBA & O'REILLY, 2016; RAGER, 2005). Ethnographic researchers spending extended time in local contexts or conducting life history interviews can encounter emotional obstacles and cultural shock. RAGER (2005) experienced deep emotional turmoil when she interviewed breast cancer patients. She described "tears running down [her] own cheeks as [she] listened with both [her] head and [her] heart ... [She] cried for the pains [the participant] had experienced and for the loneliness and fear that still gripped her" (p.23). Researchers can suffer from sleep difficulties, anxiety, gastrointestinal upset, and symptoms of depression (DICKSON-SWIFT, JAMES, KIPPEN & LIAMPUTTONG, 2009). [14]

Emotional labor can be relieved by practicing emotional reflexivity (MCQUEENEY & LAVELLE, 2017) as a tool for analyzing both research process and people. Emotional reflexivity is reading and interpreting researchers' emotional enactment during the research process. It can be enhanced through personal and collective

efforts such as writing a reflective journal during fieldwork. RAGER (2005) benefited from her record of emotional and physical reactions when she interviewed breast cancer patients; while reading her notes, she could distance herself from the strong emotional moments. [15]

Researchers also can benefit from peer support. RAGER had a monthly peer debriefing with a sympathetic colleague. It helped her to review her project progress and relieve her emotional challenges. Researchers can be socially isolated within their field sites for an extended period. Graduate students who collect research data may encounter unexpected emotional challenges without knowing with whom to share their experience and what they can ethically disclose (VELARDO & ELLIOTT, 2018). Unprepared researchers who are unaware of strategies for self and collective care in the field may be negatively affected by strong emotions resulting from emotional labor. Self-care is not merely the current tendency to promote individual practices that alleviate stress; it is the need to attend to the systemic causes of anxiety (KISNER, 2017; NICOL & YEE, 2017; PENNY, 2016) and to collectively address oppression. Setting one's research of marginalized communities within the literature of social justice can connect to this collective action and enhance efforts to manage the effects of emotional labor. While self-care

"involves embracing practices that keep us physically and psychologically healthy and fit, [it also concerns] making time to reflect on what matters to us, challenging ourselves to grow, and checking ourselves to ensure that what we are doing aligns with what matters" (NICOL & YEE, 2017, p.134). [16]

The political nature of self-care reflects the notion that "[w]hen you live in a world that seeks to do you harm or one that neglects you in such a way that your death is allowable, even necessary, both how you live and how you die are political" (KIM & SCHALK, 2021, p.331). This way of living is indicative of the experiences of oppressed research study participants and becoming intimately aware of this way of living affects the researcher. We suggest several methods for overcoming these challenges. [17]

## **4.2 Overcoming the challenges facing researchers experiencing emotional labor**

There are several significant obstacles that qualitative researchers may encounter while investigating vulnerable populations. Academic programs and advisers should address these strategies as they prepare graduate students for fieldwork. [18]

### *4.2.1 Addressing personal sadness and helplessness*

In describing her experiences of doing fieldwork in the crime ridden, poverty stricken, and militarized city of Juárez, Mexico, CERVANTES-SOON (2014) presented one way to handle emotional labor through participation in the lives of her interview subjects. While it was difficult to ignore the violence in the city, she was able to find safety and intellectual challenge in her fieldwork. Welcomed by her participants, she recognized that critical reflexivity of her positionality was not enough; it needed to be combined with action. She worked to improve the life circumstances for the students she interviewed, becoming a collaborator rather than just a researcher. The trauma of her fieldwork and her connections to her participants enhanced her research and taught her about herself. [19]

The most striking example of the burden of emotional labor that Carol experienced was during an interview when she tried to elicit a description of her participant's interaction with other mothers. When her participant was unable to describe having supportive friends, Carol didn't know how to proceed with the interview. As a mother of a child with a disability, she could easily put herself in the other woman's place; it was difficult not to feel tremendous sadness. Despite wanting to comfort the woman, Carol knew she had to remain less emotional as a researcher. It was clear to her that "the process of asking women to reveal things that they usually kept private required a research self that was quite different" (SMITH, 2014, p.137) than what she had envisioned. The unexpected response exposed that "seemingly abstract, impersonal questions [can] lead interviewees to reveal deeply personal, emotionally charged information—as if to a friend" (KIRSCH, 2005, p.2164), and it is difficult to know how to respond. [20]

There is no easy predetermined strategy to use when circumstances like this arise. Carol's responsibility in this situation was not clear to her, just as KIRSCH questioned whether she should "[l]isten empathically to her personal relationship dilemma? Refer her to a counselor? Avoid the topic and redirect the conversation?" (ibid.). A practice that Carol found useful was to record research interviews without adding her own personal responses, but when the formal interview was over and the recorder was turned off, she shared personal thoughts and experiences as a means of support before she left the participant. [21]

#### 4.2.2 Avoiding biased research

When dealing with emotionally charged research, three types of bias reviewed in literature on qualitative research may be significant, including researcher, participant, and interpretive. Investigator bias involves the personal traits and interests of the researcher, reactive bias affects the participants' responses, and confirmation bias is concerned with the analysis of the data (ROULSTON & SHELTON, 2015). The researcher may have a vivid emotional reaction to a participant's interview responses, a participant may react strongly while telling her story, and emotions may lead more easily to some interpretations of these interactions than others. It is important to recognize how bias might result. Reflexivity is significant as researchers must understand their own standpoint and positionality, listen to participants while carefully maintaining rapport, question their own ideas throughout the process, pay attention to difference, and check the data and interpretation for bias (HESSE-BIBER & PIATELLI, 2012; ROSS, 2017). [22]

Maintaining a reflective journal is a strategy that helps researchers acknowledge their positionality and become aware of possible bias. Jinhee's reflective journal helped her avoid bias. She wrote:

"When I ... worked, chatted, and ate with the North Korean defectors, I was able to see the restaurant from the employees' perspective ... as I listened to their stories about a cruel employer, I started to distrust the employer." [23]

Jinhee participated in the North Koreans' community of work and connected with them. Because of her deep engagement, she started to agree with the participants. She was concerned when she found she was judging the employer who had allowed her to enter the field. She realized her suspicion originated from the participants' distrust of the employer. Writing her feelings in her reflective journal helped her to unveil these influences and become less emotional. [24]

Pilot testing is another way for researchers to discover possible bias (CRESWELL & POTH, 2016). Jinhee's pilot study helped her to identify her false assumptions about the research participants. During her first interview experience, the participants were reluctant to speak openly. She realized she had assumed the participants would want to describe their experiences. However, she was rebuked by her participants because they did not want to reveal their personal stories, and her questions reminded them of national security agency interviews. Her pilot study enabled her to adjust her interview approach. [25]

#### *4.2.3 Building safe boundaries*

Finding a way to establish rapport with participants while making clear relationship boundaries is important for lessening emotional labor. CUOMO and MASSARO (2016) described the experience of researching within their own community. Because their study participants viewed them as "colleagues, residents, or friends rather than researchers [and although] such blurred lines may be desirable ... to get 'inside' their research site, [they] found that [they] needed to create physical and emotional boundaries to construct [themselves] explicitly as researchers" (p.95). Their strategies for creating boundaries can be applied by researchers conducting fieldwork with vulnerable populations (SCHMALENBACH & KIEGELMANN, 2018) in high-risk areas (PAWELZ, 2018). [26]

Techniques used included avoiding bringing research work home despite falling behind on fieldwork notes, recording as data only material collected in formal interviews rather than casual conversations in social contexts, and recognizing the importance of leaving out information when participants were responding to them more as a friend or colleague than as a researcher, even if it meant conducting another formal interview to address those topics, excluding observations of events, some traumatic, that occurred at the research site but were not specifically part of the research process, and taking breaks between interviews to allow for decompression (CUOMO & MASSARO, 2016, pp.99-101). These researchers set up a definite interview appointment, dressed professionally, and made research tools such as tape recorders and consent forms visible during the interview. They presented themselves as professionals with a specific research job to do. These techniques can serve researchers struggling with emotions generated by difficult fieldwork who need to step back and create some distance between themselves and their participants in order not to become emotionally overwhelmed. Jinhee learned the importance of creating boundaries when a male employee touched her inappropriately and threatened her. She discussed the situation with her adviser and stopped working at that site. She realized the challenges of taking a membership role with culturally different participants, recognizing the need for creating professional distance. [27]

#### *4.2.4 Determining the parameters of personal sharing*

Building rapport with participants is a significant part of the research process; however, a researcher must evaluate what techniques to use. Researchers can obtain more detailed and meaningful data if they establish trust with participants and invite revelations. A research interaction can be a positive experience if the participant trusts the researcher because she has disclosed some personal background information or shared interests (SIMON, 2012). Respect between the parties may increase and participants can feel more supported (ABBE & BRANDON, 2014; COLLINS & MILLER, 1994; PITTS & MILLER-DAY, 2007). Researcher self-disclosure can help a participant feel at ease, establishing the sense that the interview is a personal interaction rather than just a piece of the research process. However, there are limits to what a researcher should disclose; "the disclosures should be appropriate to the context, should favor depth over

breadth of information about the self and should be sensitive to the source's response" (ABBE & BRANDON, 2014, p.212). If a researcher does not establish reasonable parameters regarding disclosure, it can negatively affect the study. [28]

Carol often found herself thinking "Yes, I had those same experiences, thoughts, emotions" when she interviewed mothers of children with disabilities. However, she remembered an interview transcript she had read early in graduate school where the text was overwhelmingly the words of the researcher, not the participant. She used two techniques to avoid that mistake. First, she wrote her story separate from the research study. In that way, she could stand her story next to those of her participants rather than weaving her story throughout theirs. Second, after her interviews officially ended, she took time to talk mother-to-mother with her participants and share her experiences separate from data collection. Sometimes these moments brought out new facets of the mother/child dynamic that Carol hadn't thought about, but if it was something she thought should be pursued formally in the research study, she asked to conduct an additional interview. She became a better listener, interviewer, and researcher by examining the parameters of personal sharing and making conscious decisions about when and what to reveal. [29]

#### *4.2.5 Generating peer support*

Despite a researcher's involvement in her setting, she can maintain several escape routes that safeguard her emotional well-being. First, she can periodically withdraw from the setting to nourish her outside interests and limit her involvement. Second, she can periodically realign her perspective with those outsiders to analyze the setting critically (MORRIS & DAVIES, 2018). Third, she can retain sight of the fact that, ultimately, her participation in this research will be temporary in scope, and that her personal and career commitments lie elsewhere (ADLER & ADLER, 1987). Securing peer support can assist a researcher (LISIAK & KRZYŻOWSKI, 2018). [30]

While in the field, our regularly scheduled online meetings enabled us to change our perspectives as we dealt with emotional upheaval. Jinhee found that these meetings helped her to articulate what she was experiencing and then move from an emic to an etic standpoint. She was able to create distance by mapping the situation less emotionally. By describing her emotional difficulties with supportive peers, she realized that emotional labor is real and reasonable. The sense of being understood comforted her. It was also important that these meetings provided her with a feeling of community and collective interpretation of suffering. She recognized what she was going through with her participants was not unique to her situation, but it was representative of the difficulties and hardships other researchers faced in the field. [31]

The importance of peer support was clear to Carol after she began interviewing mothers of children with disabilities and found the interviews emotionally draining. She then invited a second researcher, another mother with experience in the field of disability, to join the project. By adding a co-researcher, Carol found an outlet

for her emotions. At times, both researchers conducted the interview together and jointly processed the participants' struggles. At other times, they discussed the experience after the interview was completed, yet when the emotional impact was still strong. Sharing the burden of the emotional labor was beneficial to both researchers. [32]

Davin also conducted his research with a team, which proved invaluable assistance for every phase of the research project, especially in processing the troubling and challenging experiences of ethnographic research in the context of structural inequalities in poor rural schools. The lived reality of many participants was reflected in interviews that presented complicated political, emotional, and interpersonal landscapes, requiring energy and investment to navigate. Spending time with the research team provided comfort through reflection and critical analysis. Team members became better researchers working with each other, and, equally important, listened to one another process the emotions of deep immersion in these contexts. [33]

#### *4.2.6 Advising and instructing on emotional labor*

Managing emotional labor is a general characteristic of the professional labor market, and it is a transferable skill that is worth developing (ZALEWSKI & SHAFFER, 2011). Teaching emotional territories is a necessary part of research instruction when researchers investigate vulnerable populations (VELARDO & ELLIOTT, 2018). Particularly in academia, advisers should teach learners to use and develop emotional repertoires to manage emotional labor. By teaching the concept, helping learners to identify and reflect on their experiences of emotional labor, and assisting them with developing the habit of documenting their emotions throughout the process (ZALEWSKI & SHAFFER, 2011), academic advisers and research mentors can provide novice researchers with valuable strategies. [34]

Jinhee learned about emotional labor through discussions with her colleagues and advisor. While in South Korea for her participant observation, she met with colleagues weekly through a conference call. During the regular debriefing, her colleagues asked her about her emotional and physical well-being and shared similar challenges. Jinhee was less emotional after the call and could then see her issues from different perspectives. Her colleagues' presence helped her see what she needed to do. Likewise, her adviser's early recognition of Jinhee's emotional labor and providing relevant literature allowed Jinhee to recognize her emotional and physical challenges and maintain self-care. LORDE (1988) argued that "[c]aring for myself is not self-indulgence, it is self-preservation, and that is an act of political warfare" (p.332); it is the practice of self-love required by women of color to combat the effects of intersectional oppression they encounter in their daily lives. This self-care requires making purposeful decisions of where to exert one's effort, taking decisive action, and using one's power for good (LORDE, 1988; NAYAK, 2020), goals that match those of Jinhee as a researcher. [35]

In his work with doctoral students, Davin assisted them with managing emotional labor by building caring relationships and developing effective socio-emotional

capacity. He helped students build self-awareness, especially awareness of their own needs and the types of relationships that meet those needs, by facilitating discipline, organization, and perseverance; "[e]lements of care, especially as they relate to socio-emotional learning, correlate strongly with successful outcomes in educational contexts" (ROGERS-SHAW & CARR-CHELLMAN, 2018, p.234). Simply having discussions with doctoral student researchers about the role of emotional labor and the kinds of relationships that build coping mechanisms was an important step. Authenticity in the adviser/advisee relationship was a major extension of this initial conversation. [36]

### **4.3 The rewards of research that requires emotional labor**

Facilitating performative potential can offer qualitative researchers both psychological and practical benefits. Qualitative research has the potential to create positive differences for others on personal, relational, organizational, and societal levels (ROSSETTO, 2014). Research that brings the burden of emotional labor can also present researchers with an opportunity to do meaningful work, pursue their own interests, elicit an emotional response from their readers, contribute to the academy through effectively communicating counter-narratives, and draw attention to marginalized groups, thereby questioning power relations and promoting social justice. [37]

#### *4.3.1 Doing meaningful work*

Individuals may choose to pursue advanced degrees and contribute to the research in their field because it is meaningful work (SIMON, 2012). In her examination of what it is like to be a researcher, ÅKERLIND (2008) found that academics valued their research as work that "[is] academically sound and of high quality, leading to a contribution to existing knowledge; provide[s] benefits to end-users, leading to an overall beneficial impact on the world; address[es] real-world problems and [is] directed towards finding solutions to such problems" (p.18). It is appealing to conduct research that may benefit society; this is particularly true when the research helps improve the lived experience of marginalized groups. Research can both attract individuals to a field based on their personal interests, and it can satisfy their altruistic goals. [38]

As an individual with a disability and the mother of a child with a disability, Carol wanted to contribute positively to extending access and inclusion for others with disabilities. As a South Korean citizen, Jinhee aspired to add awareness to the plight of North Korean defectors and diminish the effects of discrimination. As a professor of education, Davin worked to increase the educational opportunities for disadvantaged students. The meaningful research we conducted springs from our personal passions and the desire to eliminate stigma experienced by marginalized populations and advance social justice aims. [39]

#### 4.3.2 *Finding personal fulfillment*

ÅKERLIND (2008) found that one important aspect of being a researcher was "developing oneself personally, with research experienced as a route to personal understanding" (p.25). Researchers who found personal fulfillment in their work viewed the research process like solving a puzzle and were motivated by exploring stimulating topics from their field as well as their personal interests. Personal fulfillment from a research project was viewed as contributing to personal growth. Publication, a significant feature of academic research, increased the researcher's own understanding of an issue and peer review provided a way to improve personally. Becoming a part of the community one is researching, as ethnographers do, can also be personally fulfilling

"[w]hen research succeeds in relating authentically to the very lives of people in organisations doing what is researched, acting out daily what researchers have as outsiders identified as meaningful, then there is a congruence between research and the external world" (HANNABUSS, 2000, p.105). [40]

In Davin's work as a researcher, emotional labor forced him to be self-reflective and self-aware. Researchers are required to build authentic relationships with participants and co-researchers to achieve robust qualitative research. Research with vulnerable populations demands sensitivity and attentiveness to the needs of the participants and co-researchers. In Davin's experience, the outward, other-focused approach required of research with vulnerable populations generated a counterintuitive effect of meaning-making and fulfillment on the part of the researcher. Time constraints in the field presented real challenges, making guarantees of confidentiality, anonymity, and practical application of the research findings more important. A specific instance was a school improvement research project in which vulnerable populations of students were providing input on sensitive cultural issues in the school. The conversations were powerful and changed the trajectory of the project, but they were only possible in a context of trust in the sincerity of the researcher's ethics and purpose. The awkwardness of strangers evolved over two hours into a mutually beneficial relationship. [41]

#### 4.3.3 *Evoking emotion*

BEHAR (1996) claimed that in presenting ethnographic research findings, "readers need to see a connection between [participants] and [the researcher], despite ... obvious differences, and they need to see a connection back to themselves" (p.16); this requires vulnerability. It becomes necessary for the researcher to show herself in her writing. BEHAR discussed how vulnerable writing differs from traditional scholarly publications. Vulnerable writing requires specific skills unlike typically scientific writing, and it can be riskier as it becomes embarrassing when it is not done effectively (ROGERS-SHAW, 2021; BEHAR, 1996); the "exposure of the self who is also a spectator has to take us somewhere we couldn't otherwise get to" (BEHAR, 1996, p.14). It must allow readers to respond in a way that reveals their own vulnerability, their own connection to the participants and the researcher. This necessitates a style of

writing that evokes an emotional response from the reader (ROGERS-SHAW, 2021). Doing research about individuals who have felt oppressed and effectively sharing their struggles, can bring about an emotional response that enables readers to understand more fully what it means to be an individual in that situation, part of that group. [42]

The attempts and techniques of evoking emotion, however, need careful consideration of ethical issues and personal and social responsibilities in relation to the potential audience (MEAD, 1972). That is, although the researchers might intend to communicate within the disciplinary readerships and scholarly communities, the ethnographic monograph can be read by a broader audience including research participants, their families, and community members. Having this awareness and sensitivity to current and future audiences in mind, researchers can avoid dramatizing emotional engagement through exaggeration or commodifying emotions. [43]

Carol felt the power of evoking an emotional response when she shared a research poem on disability (ROGERS-SHAW, 2021) with a doctoral methodology class. The instructor felt like she was going to cry, and several students stated that they previously had no idea what it felt like to be a person with a disability. The words of the poem came from students in higher education with disabilities, and it became clear that the doctoral students were more open to hearing the research findings after having listened to the poetry that stirred their emotions. Qualitative researchers have the power to open the door to their research, making it accessible to a wide range of readers, by drawing a poignant picture of vulnerable participants from marginalized groups (ibid.). [44]

#### *4.3.4 Communicating effectively*

In her research on marriage circumstances and contraceptive choices in India, SMITH (2014) discussed intimacy in research both as the subject matter and as a factor in fieldwork. Because of the nature of the topic, the research "required fostering intimacy and being more vulnerable" (p.135), yet at the same time, SMITH had to be able to translate that intimacy into an acceptable academic form to share her results. [45]

Shared intimacy with her participants provided meaningful data, but angst developed in the process of sharing these results. It was in the writing that she was particularly aware of the role of power in the relationship between the researcher and participant. Employing deep reflexivity and gaining an awareness of positionality may assist researchers in navigating these situations, but SMITH cautioned that it shouldn't establish a colonizing relationship between the researcher and participant. A strategy she employed was to maintain transparency by explaining her position and politics during interviews and sharing her research findings with the participant community; however, "[t]he strategies that [she] found effective in the field, such as openness and vulnerability, seem[ed] inadequate or irrelevant to the problem of writing: how can the intimacies of fieldwork be translated to the written page without indulgence?"

(p.142). By reading of her struggles telling intimate stories in academic writing, researchers can see the value of effective communication and can be encouraged to focus on this aspect of the research. [46]

Continuing the same scenario with the students described above, Davin's credibility as a researcher depended on effective communication. Given the sensitive nature of the project, simple member checking was not enough. The researchers reconvened participants to review evidence, findings, and recommendations. Their use of participant words and emotions came under intense scrutiny, which was uncomfortable for the researchers, but solidified trust. Prior to sharing results with participants, the researchers engaged in an intensive cross-checking and triangulating process: sharing transcripts, analysis, and conclusions until everyone was satisfied. This intensive effort is an extension of the kind of caring involved in these situations. [47]

#### *4.3.5 Amplifying oppressed voices*

One aspect of marginalization is the "lack [of] access to mainstream sources of power and communication" (MATON, SEIDMAN & ABER, 2011, p.4) for oppressed individuals; "their voices and perspectives rarely are heard or used as a catalyst for action" (p.4). Researchers intending to promote social justice "must incorporate and amplify the voices of marginalized communities ... to counteract and challenge the stories of the dominant group" (GIBSON & HUGHES-HASSELL, 2017). Researchers cannot be effective advocates for vulnerable populations if their participants are viewed only as subjects. Meaningful research should foster social justice by magnifying the voices of marginalized individuals and reaching a wide audience rather than speaking for them (MANSFIELD, 2014). Research that amplifies marginalized voices can increase the understanding of the lived experiences of these groups and can enhance the sense of community as participants' raised voices can increase their influence and drive social change (MATON et al., 2011). [48]

Because they lack the power to ensure that educational environments adjust to the needs of their children and they are often viewed as failing, the voices of mothers of children with disabilities are often not heard within our society. By sharing their stories in their own words, Carol amplified their voices within the academic, research, and mainstream publishing fields. Jinhee problematized existing scholarly discourse about North Korean defectors in mainstream literature and illuminated the strengths of her participants. She realized North Korean defectors' voices are often quantified in psychology and trauma research and reproduce a deficit discourse. In addition, standard semi-structured interviews can remind them of past experiences of torture and investigation. By working with participants and collaboratively constructing their stories of everyday work and life circumstances and then sharing transcripts in their original language, Jinhee prioritized the perspectives of North Korean defectors. [49]

#### 4.3.6 *Offering counter-narratives*

Research stories can promote dialogue, share life experiences, provide counter-narratives, and disrupt hegemonic views. Counter-narratives present

"the stories of those people whose experiences are not often told (i.e., those on the margins of society). The counter-story is also a tool for exposing, analyzing, and challenging the majoritarian stories [and] can shatter complacency, challenge the dominant discourse" (SOLÓRZANO & YOSSO, 2002, p.32). [50]

For example, recent neurodiversity research has positively influenced adults with disabilities by defining learning disabilities as a bio-political category rather than a disorder, a natural variation rather than a deficit, presenting a counter-narrative that values difference (RUNSWICK-COLE, 2014). Carol recognized the danger of the "good mother" narrative for mothers of children with disabilities. Socially accepted views of good mothering "set standards that no human being could ever match" (CAPLAN, 2013, p.100). For mothers of children with disabilities, the struggle to meet unrealistic, socially constructed expectations of a "good mother" is a burden. A mother of a child with autism can be labeled a "bad mother" if the stimulation of lights and noise brings about what appears to be a tantrum in the grocery store. Or a mother of a child with a learning disability can be viewed as not working hard enough to help her child be successful in school tasks or homework completion. The weight of trying to live up to these unrealistic standards constructed within society leaves women feeling like failures. Carol found it rewarding to offer mothers the opportunity to tell the success stories of their mothering experiences and the pride they felt for the accomplishments of their children with disabilities. The mothers also found it rewarding to counter the perceptions of themselves and their children. [51]

#### 4.3.7 *Promoting social justice*

As researchers from the discipline of adult education that deals with the learning and education of adults (FEJES & NYLANDER, 2019), issues of social justice are paramount for us as "the core of the work of adult and continuing education is a concern with equity" (KASWORM, ROSE & ROSS-GORDON, 2010, p.6). HORTON, a leader in the adult education field, expressed "loyalty to people, not institutions" (MOYERS & HORTON, 1982, p.250), encouraging individuals to "create a new [system] ... that would be more humane" (p.284), and "help people perceive things differently" (p.275); effective qualitative research can meet this goal. Researchers with social justice goals must recognize that claiming there is oppression is not enough; they must provide the opportunity for their audience "to discuss and explore these injustices using their own perspectives and experiences so that they may fully understand them and enact change" (JOHNSON-BAILEY, BAUMGARTNER & BOWLES, 2010, p.340). Adult educators challenge learners to critically evaluate their beliefs, be inclusive of the voices of Others, and contribute to improving society by sharing the contributions of those who have been marginalized (JOHNSON-BAILEY et al., 2010); the same is true of research with vulnerable populations. [52]

By sharing stories of mothers whose children have disabilities, Carol hoped to help others better understand what it is like to be a mother in these challenging circumstances and become more tolerant, respectful, and equity-minded, avoiding judgment if a mother does not appear to fit the socially constructed image of a "good mother." Greater awareness and acceptance of further social justice aims is important. Jinhee's social justice endeavor was to increase the awareness of the experiences of labor exploitation of North Korean defectors. She believed amplifying the voices of North Korean defectors and sharing their perspectives will increase socially responsible, culturally sensitive, and personally caring research practice. By laying bare the cultural and political conditions relegating certain rural schools to the margins of society, Davin hoped to inform policy decisions and enable high quality leadership approaches to address these challenging situations. Additionally, adding the voices of these teachers to the broader conversation will empower others to speak out, while also providing a useful point of reference for common experiences of trauma. [53]

#### *4.3.8 Identifying power relations*

A key factor in negotiating the back and forth between a researcher and a participant is understanding the difference between friendliness and friendship. KIRSCH (2005) suggested that feminist methodologies that focus on interaction, collaboration, and communication between the researcher and participants bring with them the possibility that what appears to be a researcher/participant friendship that elicits very personal data may hide true inequities where the power rests in the researcher. Friendships

"develop over time and are built on reciprocal trust and shared information and activities, [whereas] interviews are likely to be asymmetrical interactions, with one party—the party generally with the most institutional power—asking the questions and the other answering" (p.2165). [54]

By viewing these relationships as the result of researcher friendliness rather than friendship, a researcher can acknowledge that while establishing rapport can reveal personal details, researchers need to avoid exploitation. Pursuing friendliness rather than friendship can also help researchers maintain a safe boundary. It is essential to avoid faking friendship (DUNCOMBE & JESSOP, 2002) via this friendliness; therefore, openly determining clear boundaries needs to become a priority. These boundaries can help keep interviews in the realm of friendliness rather than friendship, allowing researchers avoid both taking advantage of participants' willingness to divulge deeply personal information and limit the burden of emotional labor. Acknowledging that there are competing approaches to how these boundaries are defined and established, e.g., friendship as method (TILLMANN-HEALY, 2003), we have found the focus on friendliness to be most effective in the context of emotional labor. The benefit of this attention to the researcher/participant relationship is the researcher's growing understanding of power relations. By identifying power relations, researchers can more effectively conduct research that accomplishes social justice aims. [55]

The researcher and participant relationship is complicated. In Davin's experience, the most prominent problem in this relationship is a failure to acknowledge and prepare for the dynamic and multi-faceted nature of the researcher/participant interaction. A researcher imagining a simple conversation is unprepared for the emotional labor of eliciting rich data from a well-developed relationship with a member of a vulnerable population. Power relationships can complicate the potential good work of social research. Davin's work with vulnerable populations is guided by the ethical framework of promises made to participants: confidentiality and anonymity, accurate representation of the participant's words, actions, and context, member checking, and a commitment to producing research that can improve social conditions. These promises, coupled with a deep sensitivity to the emotional, psychological, and social implications of any interview, offer the best opportunities for accomplishing social justice aims and avoiding further marginalization. [56]

## 5. Conclusion

While challenging, qualitative research that demands emotional labor on the part of the researcher is a worthwhile endeavor. BEHAR (1996) described the research process as follows:

"Loss, mourning, the longing for memory, the desire to enter the world around you and having no idea how to do it, the fear of observing too coldly or too distractedly or too raggedly, the rage of cowardice, the insight that is always arriving late, as defiant hindsight, a sense of utter uselessness of writing anything and yet the burning desire to write something, are the stopping places along the way. At the end of the voyage, if you are lucky, you catch a glimpse of a lighthouse, and you are grateful" (p.3). [57]

When conducting research with marginalized populations, there is a sense of loss, whether it is the loss of the imagined child that mothers of children with disability may feel, or the loss of the familiar and the families left behind which North Korean defectors experience, or the loss of opportunities available in under-resourced rural schools. Researchers may mourn alongside their participants as they gather rich details of the participants' lived experiences. They may question their ability to tell the stories of their participants effectively to generate empathy and understanding in their readers. Researchers may struggle to make sense of their participants' lives in a way that amplifies their voices rather than further marginalizing them. Yet despite their struggles, researchers can overcome the obstacles through managing their emotional labor. By acknowledging that the research work is meaningful because it does evoke emotion and offer counter-narratives that promote social justice, researchers can find personal fulfillment and understand the rewards of qualitative research that requires emotional labor; they can feel grateful that they endeavored to do this hard work. [58]

The vulnerability of doing significant research with marginalized populations comes from allowing oneself to become part of a community to describe it from the inside, but the dilemma is how to force oneself to remain outside enough to

report on it. We experienced this vulnerability as we became part of the community of mothers of children with disabilities, North Korean defectors, and educators addressing the needs of children in rural areas. We learned that despite the challenges of conducting emotionally difficult research, such work often offers the greatest opportunities for making life better. [59]

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